

Part A. Request *(To be completed by the Requesting Official)*

<div>(4) Description of Product or Service</div>	
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(6) Does the procurement meet the definition of a bundled Contract? (FAR Part 7.107 and 13 CFR Part 125.2 (d)(1)(i))

☐ YES ☐ NO (for clarification on Bundling coordinate with the Operational Small Business Specialist)

Name/Signature of Requesting Official: _____ Date: _____

Part B. Strategy *(To be completed by the Contracting Officer)*

(3) NAICS Code	(4) Small Business Size Standard Employees Avg. annual receipts	(5) Synopsis [FAR Part 5.202(a)] <input type="checkbox"/> YES <input type="checkbox"/> NO, exceptions
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(6) Prior Procurement History:

New Requirement ☐ YES ☐ NO (If no, please consult with your DHS Operational SBS to complete (6))

Contractor Name & Address	
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No. of Offerors: ☐ LB ☐ SB ☐ HUBZ. ☐ SDB ☐ 8(a) ☐ WOB ☐ SDVO ☐ VET

Remarks:

(7) Period of Performance: Base Period FROM: TO: ; Option Periods FROM: TO:

(8) Proposed Procurement Method: **Please consult your DHS Operational Small Business Specialist for assistance.**

First Consideration: Consider one of the socioeconomic initiatives.

Competitive

- ☐ 8(a)
- ☐ HUBZone Set-Aside
- ☐ SDVOSB Set-Aside
- ☐ Total SB Set-Aside
- ☐ Partial SB Set-Aside

Sole Source

- ☐ 8(a)
- ☐ HUBZone
- ☐ SDVOSB
- ☐ Partial SB

Second Consideration: If first consideration above is ruled out based on market research, consider small business teaming or joint venture in conjunction with one contract vehicle above. Companies names and addresses involved:

DHS Form 700-22 (11/04)

Third Consideration: If first two considerations have been ruled out based on market research, then turn to full and open competition where an other than small business concern is expected to serve as the prime contractor and small business participation will be critical through subcontracting and the DHS Mentor-Protege Program.

Competitive

- ☐ Unrestricted (Full and Open)
☐ Multiple Award (SB & LB)

Sole Source

- ☐ Other (attach Justification)

Pre-existing Contract Vehicle

- ☐ GSA-Multiple Award Schedule - MAS
☐ Multiple Award Contract - MAC
☐ Govt-wide Acquisition Contract - GWAC
(Please attach proposed list of vendors)

Subcontracting Plan Discussion with SBS ☐

Mentor-Protege Program Discussion with SBS ☐

(9) Reason for Unrestricted Procurement

- ☐ No reasonable expectation that offers will be obtained from at least two 8(a) program participants (greater than \$3 million for services, greater than \$5 million for manufacturing), HUBZone small, Service Disabled Veteran Owned small or traditional small business concerns offering the products of different small business concerns.
☐ No reasonable expectation that award can be made at a fair market price.
☐ Sole Source/Proprietary Item Justified in accordance with FAR Part 6.302-1.
☐ Requirement not severable into two or more production runs or lots pursuant to FAR Part 19.202-1(a).
☐ Other: Document with attachments.

(10) Bundling Review

Does the procurement meet the **definition of a bundled Contract?** (FAR Part 7.107 and 13 CFR Part 125.2 (d)(1)(i))

☐ YES ☐ NO; If yes continue, if No please sign and forward to the Operational Small Business Specialist.

Did Organizational Element (OE) coordinate acquisition strategy with the small business specialist and the Small Business Administration (SBA) Procurement Center Representative (PCR) when procurement dollar amount meets the **Substantial Bundling** threshold of \$2 million? (13CFR Part 125.2 (b)(2)(i)) ☐ YES ☐ NO

If procuring activity believes bundling is necessary and justified was proper analysis submitted to achieve measurably substantial benefits as prescribed in (13CFR Part 125.2 (d)(5)(i))? ☐ YES ☐ NO

Was requirement to notify current small business contractors of intent to bundle performed? 13CFR Part125.2(d)(4)

☐ YES ☐ NO

Name/Signature of Contracting Officer: _____ Date: _____

Part C. Small Business Program - Recommendation (To be completed by the DHS Operational Small Business Specialist)

- ☐ Small Business Program (if competitive, reasonable expectation that 2 or more small businesses can be found responsible, offering fair and reasonable pricing.)

Type: ☐ 8(a) Set-aside (sole source ☐ competitive ☐)
☐ HUBZone Set-aside (sole source ☐ competitive ☐)
☐ Service Disable Veteran Owned Small Business Set-aside (sole source ☐ competitive ☐)
☐ Traditional Small Business Set-aside

- ☐ No Set-aside Recommendation (check the appropriate box and provide supporting justification for each reason checked in consultation with the contracting officer)
☐ No reasonable expectation of receiving offers from 8(a) program businesses, HUBZone businesses, SDVOSB businesses, or small businesses that are capable of performing the requirements of the PR at a fair market price.
☐ Extension of current services to allow preparation/award of competitive procurement.

Contractor Name: _____

Contract Number: _____

- ☐ Non-competitive action which has necessary approvals as of this date.

☐ Other: _____

Does the procurement meet the definition of a Bundled Contract? (FAR Part 7.107 and 13CFR Part 125.2(d)(1)(i)) YES ☐ NO ☐
(If yes, notify the Office of Small and Disadvantaged Business Utilization (OSDBU)

Name/Signature of Small Business Specialist: _____ Date: _____

Part D. Signatures (To be completed by the Contracting Officer, Operational Small Business Specialist, and SBA Procurement Center Representative (as applicable; see **Review Thresholds** on page 3, instructions)

(1) Contracting Officer ☐ Concurrence ☐ Non-Concurrence (Attach justification)

Name/Signature of Contracting Officer: _____ Date _____

(2) Operational Small Business Specialist ☐ Concurrence ☐ Non-Concurrence (Attach justification)

Name/Signature of Operational Small Business Specialist: _____ Date _____

(3) SBA Procurement Center Representative ☐ Concurrence ☐ Non-Concurrence (Attach justification)

Name/Signature of SBA Procurement Center Representative: _____ Date _____

INSTRUCTIONS FOR USE
DHS FORM 700-22, SMALL BUSINESS REVIEW FORM (for Acquisitions over \$100,000)

1. A separate form shall accompany every open market purchase request over \$100,000 and every GSA FSS or GWAC procurement \$2,000,000 and above for bundling.
2. The Operational Small Business Specialist shall complete the review process within 2 business days. The Small Business Administration (SBA) Procurement Center Representative (PCR) shall complete the review process, including bundling within 2 business days, when applicable (\$2,000,000 and above).
3. Part A describes the **Request**, Part B describes the acquisition **Strategy**, and Part C describes the **Recommendation**.

Small Business Consideration Process:

- First, consider small business prime contracts [such as 8(a) program participants, HUBZone businesses, Service Disabled Veteran Owned Small Businesses, traditional Small Business Set-asides;
 - Second, if the first consideration has been ruled out based on market research, consider small business teams or joint ventures; and
 - Third, if the first and second considerations have been ruled out based on market research, turn to full and open competition where other than small businesses are expected to serve as the prime contractors and small business participation will be critical through subcontracting and the DHS Mentor Protégé Program.
4. Part A shall be completed and signed by the Requesting Official.
 5. Part B shall be completed and signed by the Contracting Officer.
 6. Part C must be completed and signed by the Operational Small Business Specialist prior to acceptance by the Contracting Officer. In the event that the Operational Small Business Specialist is not available to complete Part C for a period longer than 2 business days, the requirement should be discussed with the DHS Office of Small and Disadvantaged Business Utilization (OSDBU).
 7. Part D must always be signed by the Contracting Officer and the Operational Small Business Specialist and additionally must be signed by the SBA Procurement Center Representative when the acquisition is not set-aside for small business participation and the dollar value is anticipated to be \$2,000,000 or more.
 8. Review Thresholds and applicability for acquisitions (Thresholds include base plus option periods):
 - a) Acquisitions greater than \$100,000, review open market acquisitions by the Contracting Officer and Operational Small Business Specialist.
 - b) Acquisitions \$2,000,000 and above, review open market acquisitions as well as FSS acquisitions task order or delivery orders from any source of multiple award contracts for bundling by the Contracting Officer, Operational Small Business Specialist, and SBA Procurement Center Representative. (PCR only signs unrestricted actions)
 9. Completed forms are to be placed in the Solicitation File.

Special Note: *While each section of the form identifies the appropriate office for completion of that section (i.e. Requesting Office, Operational Small Business Specialist, and the Contracting Officer), a successful small business program requires coordination with and participation from all three offices.*